

FIDUCIARY BOARD

Meeting Agenda – Thursday, September 6, 2018

Arizona Supreme Court -1501 West Washington Street

Phoenix, Arizona 85007 - 10:30 A.M. Conference Room 109

General Inquiries Call: 602-452-3378 (Certification and Licensing Division Line)

Members of the public may attend meeting in person.

For any item listed on the agenda, the Board may vote to go into Executive Session for advice of counsel and/or to discuss records and information exempt by law or rule from public inspection, pursuant to the Arizona Code of Judicial Administration, Code Section 1-202(C).

CALL TO ORDERDeborah Primock, Chair

1) REVIEW AND APPROVAL OF MINUTES.....Deborah Primock, Chair

1-A: Review, discussion and possible action regarding the regular session minutes of the meeting held on July 12, 2018.

2) PENDING COMPLAINTS..... Division Staff

2-A: Review, discussion and possible action regarding complaint numbers 17-0001 and 17-0002, involving licensees Elizabeth Crosby and Integrated Fiduciary Services, Inc.

2-B: Review, discussion and possible action regarding complaint number 17-0015, involving licensee Krista Cline.

2-C: Review, discussion and possible action regarding complaint number NC18-0036, involving Mario Gonzales.

2-D: Review, discussion and possible action regarding complaint numbers 17-0022, involving licensee Charles Fuss.

2-E: Review, discussion and possible action regarding complaint numbers 16-0019 and 16-0020, involving licensees Leslie Mann-Damon and Next Steps for Families, LLC.

2-F: Review, discussion and possible action regarding complaint numbers 17-0026, involving licensee Jane Anne Geisler.

2-G: Review, discussion and possible action regarding complaint numbers 17-0032, involving licensee Maricopa County Public Fiduciary.

3) INITIAL LICENSURE AND ELIGIBILITY.....Division Staff

3-A: Review, discussion and possible action regarding the following applications for initial individual licensure:

1. Elise Bajohr
2. Alex Harris

4) LICENSURE AND ELIGIBILITY

4-A: Review, discussion, and possible action regarding the request of Richard Holmes to retake the Fiduciary Licensing Examination.

5) ADMINISTRATIVE ISSUESDivision Staff

5-A: Review, discussion and possible action regarding the establishment of the 2019 Board meeting schedule.

CALL TO THE PUBLICDeborah Primock, Chair

ADJOURN.....Deborah Primock, Chair